# NOTICE

Please note that this bid from Komax Business Systems for RFI_ISC2100000001 was received in the Purchasing Division prior to the bid opening date and time on March 2, 2021. However, the bid submitted did not get read aloud during the public bid opening.

Guy Nisbet
Assistant Purchasing Director

KOMAX
Business Systems
Celebrating 20 Years

PRO-TECH
SERVICE CENTER
2018 - 2019
KONICA MINOLTA
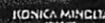
500 D Street, South Charleston, WV 25303 | Phone: (304) 744-7440 | www.komaxwv.com

March 2, 2021

Mark Atkins
WV State Purchasing Division

CRFI-0210   ISC21-00000001

Dear Mr. Atkins,

Komax LLC, as a locally owned and operated WV company, is working with Foxit Software as a local vendor to help provide the best sales and service support for this opportunity on standardizing PDF editing software for the state agencies.

Instead of re-creating a whole new submission, we are just duplicating the response that Foxit Software has already submitted but wanted to make sure that Komax is still considered as a vendor on any future responses or bids. If you need any further information verifying our relationship with Foxit, just let me know. But to keep things simple, we will be partnering with Foxit Software for any demo's, trials, or questions you have about the software.

Please let me know if you have any questions.

Sincerely,

David Humphrey
Specialty Products & Government Sales Manager
304-744-7440

Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130	**State of West Virginia** **Centralized Request for Information** **Info Technology**	

		Reason for Modification:
Proc Folder: 836421		
Doc Description: RFI for PDF Editing Software Standardization		
Proc Type: Request for Information		

Date Issued	Solicitation Closes	Solicitation No	Version
2021-01-29	2021-03-02 13:30	CRFI 0210 ISC2100000001	1

BID RECEIVING LOCATION

BID CLERK
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION
2019 WASHINGTON ST E
CHARLESTON   WV   25305
US

VENDOR

Vendor Customer Code:

Vendor Name : KOMAX, LLC

Address : 500 D ST.

Street :

City : SOUTH CHARLESTON

State : WV   **Country :** USA   **Zip :** 25303

Principal Contact : DAVID HUMPHREY

Vendor Contact Phone: 304-744-7440   **Extension:** 110

FOR INFORMATION CONTACT THE BUYER
Mark A Atkins
(304) 558-2307
mark.a.atkins@wv.gov

Vendor Signature X _(signature)_   **FEIN#** 55-0767809   **DATE** 03/02/2021

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

STANDARDIZATION DETERMINATION REQUEST

Request For Information (RFI)

The West Virginia Purchasing Division has been requested to approve the Standardization of PDF Editing Software by the West Virginia Office of Technology (WVOT). Pursuant to West Virginia Code 5A-3-61, the West Virginia Office of Technology is requesting the Standardization of PDF Editing Software that provides enhanced features such as combining files, page extraction, and other editing functionalities, per the attached documents.

NOTE: Online responses are prohibited with this solicitation.

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Total Price
1	See Attached Request for Information Files	0.00000			

Comm Code	Manufacturer	Specification	Model #
43230000			

Extended Description:
Request for Information for PDF Editing Software for standardization

SCHEDULE OF EVENTS

Line	Event	Event Date
1	Technical Questions due by 10:00am EST:	2021-02-09

	Document Phase	Document Description	Page 3
ISC2100000001	Draft	RFI for PDF Editing Software Standardization	

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Foxit Software, Inc.

41841 Albrae Street

Fremont CA, 94538

Request for Information (RFI) Response

STANDARDIZATION NOTICE

March 1, 2021

West Virginia Office of Technology (WVOT)

CRFI 0210 ISC2100000001

Standardization of PDF Editing Software

Casey Nicodemus
State Government Account Executive
Direct: (470) 615-1296
Cell: (404) 918-9830
Email: casey_nicodemus@foxitsoftware.com
3625 Brookside Parkway, Suite 150 Alpharetta, GA 30022

March 1, 2021

Mark Atkins
Senior Buyer
Department of Administration
Purchasing Division
2019 Washington Street, E.,
Capitol Complex Building 15
Charleston, WV 25305

Dear Mr. Atkins:

Foxit Software appreciates this opportunity to present our response to West Virginia Office of Technology's Request for Information CRFI 0210 ISC2100000001, regarding the Standardization of PDF Editing Software.

Please contact Casey Nicodemus for any additional information or clarification regarding Foxit's response to the RFI. His contact information is:

Casey Nicodemus
State Government Account
Executive 41841 Albrae St
Fremont, CA 94538
Email:casey_nicodemus@foxitsoftware.com
Telephone: 470-615-1296

Sincerely,

Senior Vice President of
Sales Foxit Software

Contents

Executive Summary

To achieve its goals "to develop an organized approach to information resource management while providing technical assistance in the design and management of information systems for the state and its agencies", West Virginia Office of Technology (WVOT), via West Virginia Purchasing Division, is issuing a Standardization Notice to all vendors that desire to provide PDF editing software to the state. The Covid-19 pandemic has highlighted the need for this software as employees working remotely no longer have access to printers and scanners. For this purpose, WVOT has released CRFI 0210 ISC2100000001 to establish a prudent and fair evaluation of the quality of these vendors PDF editing software, to provide guidance on the most cost-effective solution for state, its agencies, and taxpayers.

Foxit Software is uniquely positioned to support the WVOT, its mission, the State of West Virginia, and its taxpayers. Our sole focus is on PDF technology and our 500 users worldwide have selected Foxit for numerous reasons, such as:

- **Functionality** – Foxit PhantomPDF is a fully-featured PDF editor, with capabilities ranging from simple Editing and Organizing to more advanced features like OCR-ing and redaction at mass, with our Search & Redact feature.
- **Ease-of-use** – With Foxit utilizing the Microsoft ribbon UI, PhantomPDF has the look and feel Word, PowerPoint, or Excel. Features are separated into common function tabs, such as Edit, Convert, Organize, or Form, where user can intuitively find the tool the need to employ. Additional, PhantomPDF employs the Microsoft "Tell me more," commonly symbolized with a lightbulb graphic, where users can simply search for the feature they desire by name.
- **Flexible Licensing Options** – Foxit offers the option between subscription and perpetual licensing w/ software assurance. As well as, registration code, server key or named user/assigned licenses via our portal, to fit all our customers preferences and environments.

Our RFI response focuses on PhantomPDF's interoperability with the State's devices and its operating systems.

Foxit is confident that as WVOT conducts its evaluation, Foxit PhantomPDF will stand out for our comprehensive technology, support, training, and competitive pricing. Our goals are to complement and partner with WVOT to equip and empower West Virginia with the most capable and cost-effective PDF software as they continue to cope with the effects of COVID-19 on their staff's technology demands, agencies budgets, and taxpayers lives as well as after business returns to normal.

4.1 | Methods of Testing/Analysis/Interoperability and Objectives:

4.1.1 | The State desires to have an enterprise-level, transferable licensing model, whereby a previously purchased license can be reassigned to another employee without requiring the State to purchase that license again. Please explain how your proposed product can meet this goal or describe in detail any other cost savings your proposed product offers.

Foxit supports flexible licensing, either Perpetual or Subscription models, that allows licenses to be easily transferred from one employee to another without purchasing additional licenses. The license can be transferred via our Admin Console or using standard deployment tools such as SCCM. Cost savings can also be achieved over time by purchasing Perpetual licenses rather than an annual Subscription license. These licenses can be maintained and transferred at the enterprise-level.

4.1.2 | The State's network security is vitally important and products on the network must be secure and up to date. As such, the State desires a PDF editing software that ensures continued functionality, updates to fix bugs and patches to address security vulnerabilities. Please describe how your company and/or proposed solution addresses bugs, upgrades, patches, and fixes.

Foxit is committed to providing exceptional support, we will support the current and previous version of the software at any given time. Additionally, the State will have access to Foxit's 24/7 support team to report any bugs or issues. The State will have access to allow upgrades with an annual Subscription license, or by annually purchasing Software Assurance and Support for any Perpetual licenses.

Security patches are released as needed and software enhancements are typically limited to one per year (or as needed to address bugs or software deficiencies)

4.1.3 | The State desires a PDF editing software that can be used with both Microsoft Office products and Google's Workplace suite. In particular, the State desires the ability to have a PDF editor that can convert documents, spreadsheets, and other productivity tools into PDFs, as well as the ability to convert PDFs into editable documents.

Foxit PhantomPDF can convert Microsoft Office / Google Workplace's documents such as .doc, .xls, .ppt, .docx, .xlsx, and .pptx to PDF. The software has a built-in OCR engine to help the State turn any document into a fully editable PDF.

Additionally, users will be able to access/create PDFs directly from Microsoft's SharePoint/OneDrive or Google Drive with the built-in integration into those storage solutions. Illustrated below:
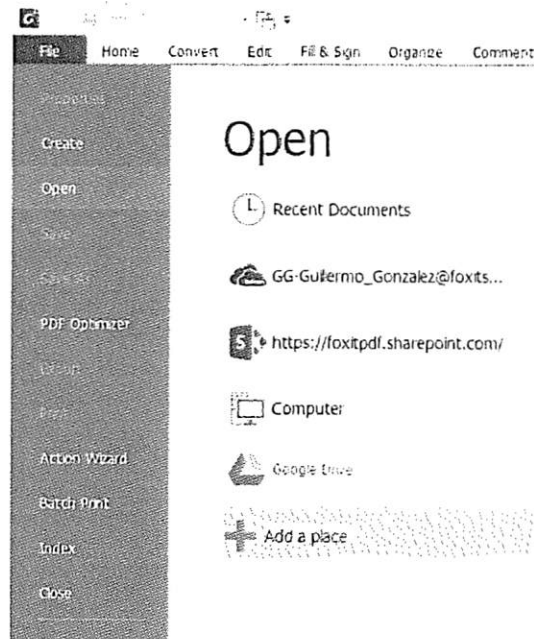

(PhantomPDF Windows shown)

4.1.4 | The State is seeing an increased reliance on mobile devices, such as smartphones and tablets. The State desires a PDF editing software that is compatible with both iOS and Android devices. Please describe your product's compatibility with mobile devices, different operating systems, and the licensing model to do so. Specifically, is there an additional license or fee associated with this mobile requirement, or is it built into the cost of the license.

Foxit offers an iOS/Android PDF Editing application. The application has the following features:

- Edit PDF text and images.
- Create a blank PDF.
- Convert Microsoft Office files, HTML, TXT, and image files to editable PDFs.
- Export PDF documents to Microsoft Word, PowerPoint, Excel, TXT, image, RTF, and HTML files.
- Redact PDF content to protect sensitive information.
- Insert audios, videos, and hyperlinks to PDF.
- Add/verify digital signatures to PDF documents.
- Protect PDF documents with passwords.
- Reduce file size – PDF compression.
- Integration with OneDrive Business, iCloud, and SharePoint (SharePoint available for iOS only).
- Read and annotate Microsoft Rights Management protected files.
- Integrated Microsoft Intune support
- Reflow PDFs for easy viewing.
- Easy document navigation with bookmark management features.
- Search for text within your PDF documents.
- Full commenting toolset, including utilizing digital pressure-sensitive ink technology.
- Integration with Google Drive, Box, Dropbox, and OneDrive.

4.1.5 | As a centralized IT organization, the State desires the ability to administer the licenses from an administrator portal. The portal, which will have multiple administrators, would provide the capability to install and assign, reassign, and remove licenses from users' devices or accounts. Please describe your product's centralized administration offering, including the functionalities an administrator has.

The State will be able to utilize Foxit's Enterprise Admin Console (FAC) Administrator Portal to assign, remove, transfer and/or reassign previously purchased Windows licenses. Support for macOS license administration coming later in 2021.
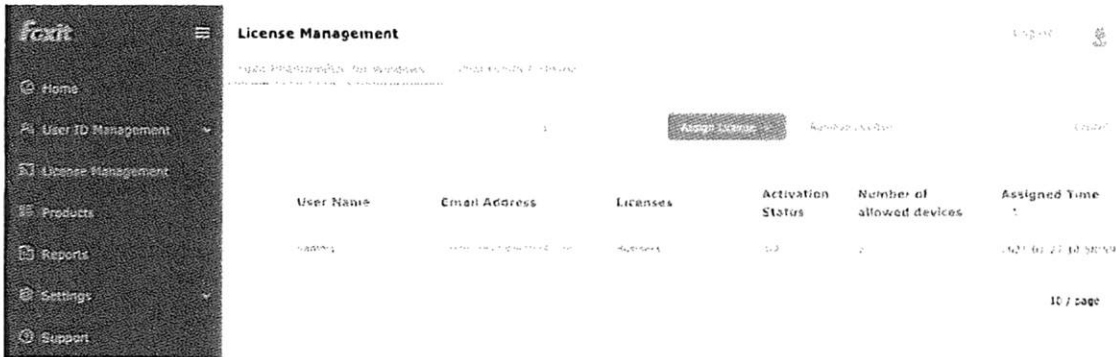
An Administrator of FAC will be able to:
- Configure the console:
  o Setup AD, SSO, LDAP or SAML.
  o Manage PhantomPDF Packages
  o Manage the branding for The State's console
  o Invite other admins
- License Management:
  o Assign
  o Reassign
  o Revoke
  o Create user groups
  o Add or remove product licenses
- Reporting:
  o Create usage reports
  o Create console logs

4.1.6 | The State desires a robust set of editing functionalities, **including, at a minimum:**

4.1.6.1 | Locking the PDF so no other user may make changes

PhantomPDF as well as our Mobile App can lock PDFs, so no other user is able to make changes.

Password Protection   ✕

  Document Open Settings

  ☑ Require a password to open the document

    Password Input: [   ]   Password Confirm: [   ]

  Document Restriction Settings

  ☑ Add Document Restriction

    Password Input: [   ]   Password Confirm: [   ]

  Permission Specification

      Printing: High Resolution

    Accessibility: Allowed

      Copying: Allowed   Permission...

      Changes: Any except extracting pages

  Encrypt Settings

    Encryption Algorithm: ◉ 128-bit AES   ○ 256-bit AES   ○ 128-bit ARC-FOUR

  ☐ Don't encrypt metadata

 ☐ Save the settings as a new policy   OK   Cancel

(PhantomPDF Windows shown)

4.1.6.2 | Creating a Fillable form, whereby users can only type in the designated areas of the Form.

In PhantomPDF users can navigate to the Forms Tab where they'll be able to utilize form fields to create fillable forms manually or automatically using the Form Field Recognition Tool.

Users will also be able to create Advanced PDF forms using Actions and Form Field Properties, such as creating a Submit Button or locking fields after signatures have been applied.
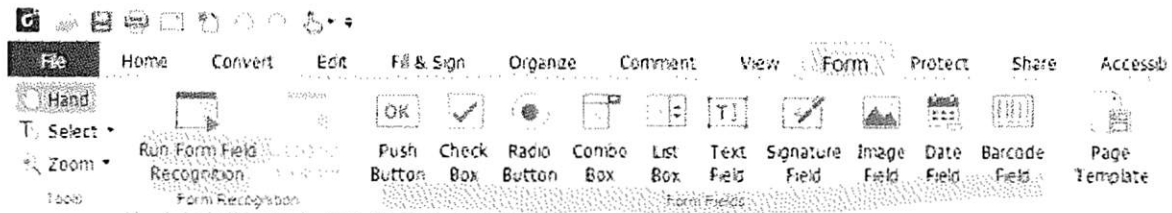
(PhantomPDF Windows shown)

4.1.6.3 | Editing the PDF by being able to insert pictures or text

From the Edit Tab in PhantomPDF users can access the Edit Text tool to insert/edit text or the Edit Object tool to add/remove or edit images with the built-in image editor.
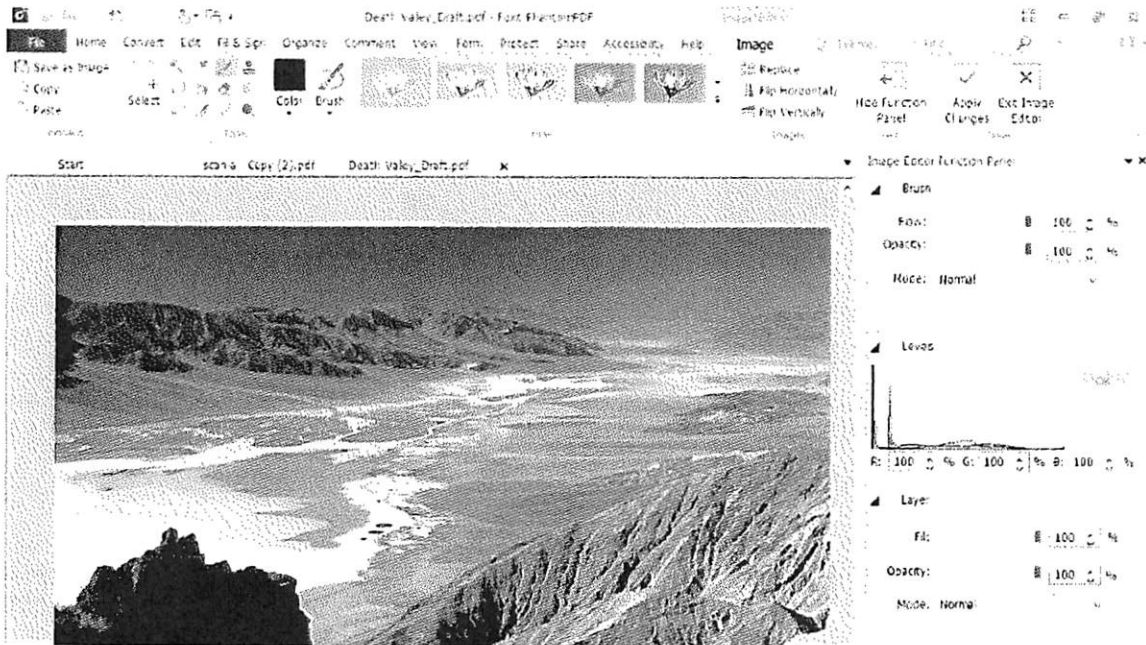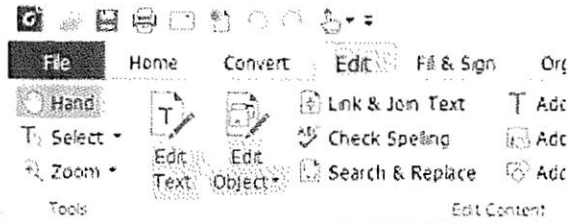
(PhantomPDF Windows shown)

4.1.6.4 | Combining multiple files into one file

Foxit PhantomPDF can combine pages using the Combine Tool.

Additionally, users will also be able to combine multiple file formats into PDF and/or add a table of contents during the combine process.

Combine files into a single PDF

    Add files...

Arrange your files

Name	Modified	Range	Size	Bookmark for File	Bates Numbering	Warnings/t
Compress_Optimize.pdf	2020-10-23 14:15:33	ALL	30.1 MB	Compress_Opti...		
Death Valley.pdf	2021-02-24 15:31:51	ALL	1.22 MB	Death Valley		
Demo Agenda.pdf	2020-10-28 17:02:48	ALL	329 KB	Demo Agenda		
Excel Form.xlsx	2019-12-12 15:33:18	ALL	114 KB	Excel Form		
Form.pdf	2020-01-07 14:55:50	ALL	74.8 KB	Form		
Foxit Accx Demo.docx	2019-09-25 16:33:22	ALL	98.3 KB	Foxit Accx Demo		
HealthOne Form.docx	2019-12-11 21:36:52	ALL	41.5 KB	HealthOne Form		
Manual.doc	2019-01-17 17:26:02	ALL	86.0 KB	Manual		
Sales Invoice_OG.xlsx	2018-12-19 17:59:48	ALL	12.3 KB	Sales Invoice_OG		
scan.tiff	2017-09-06 02:54:59	ALL	1.03 MB	scan		
SS-Admin.pdf	2018-04-05 19:23:04	ALL	428 KB	SS-Admin		

    Move up   Move down   Remove

☑ Add a new table of contents page converted from bookmarks

☐ Retain the logic page number during combination

Co

(PhantomPDF Windows shown)

4.1.6.5 | Extracting pages from one file into separate files

The Extract pages tool can be accessed either by going to the Organize Tab or via Context Menu in the Page Thumbnail.

Extract Pages   ✕

  Page Range

    Pages: [1]   of   10

        Sample:1,5-9,12 ⓘ

   Extract: All pages in range   ⌄

  Extract Mode

  ◉ Extract pages as one PDF

  ◯ Extract pages as several PDFs by comma(,) sign

  ◯ Extract each page as a PDF

  ☐ Immediately save extracted pages

  ☐ Delete the pages after extraction

  ☐ Show Preview   [OK]   Cancel

(PhantomPDF Windows shown)
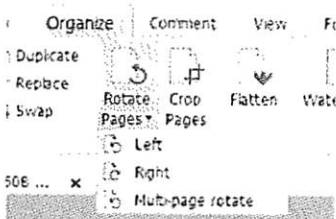
4.1.6.6 | Deleting pages from a PDF document

The Delete Pages tool can also be accessed via the Organize tab or Page Thumbnail Context Menu. Users will be able to delete one or multiple, pages based on a range and more.

Delete Pages   ✕

Page Range

Page: [1]   of   10

Sample:1,5-9,12 ⓘ

Delete: All pages in range ▾

☐ Show Preview

[OK]   Cancel
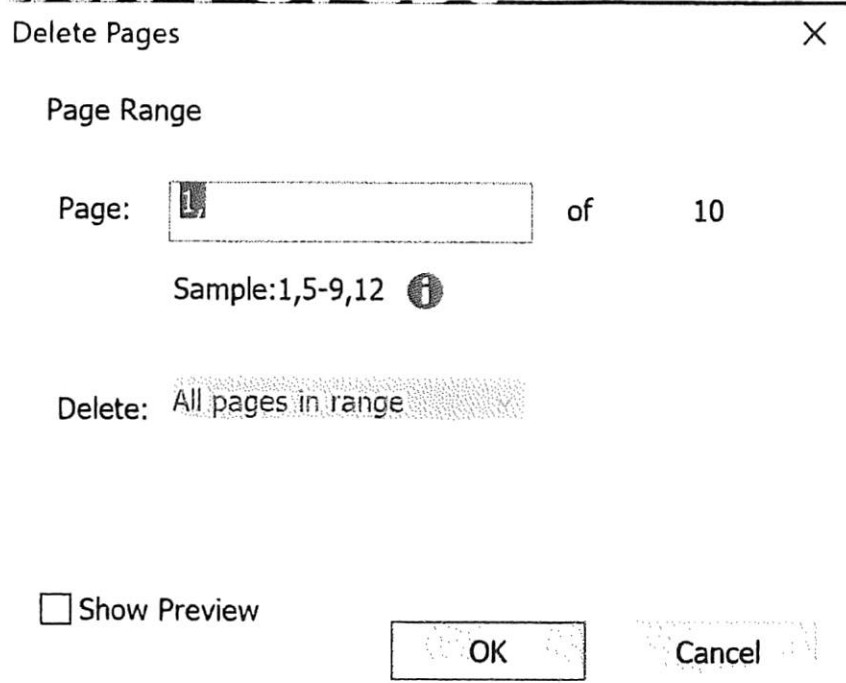
(PhantomPDF Windows shown)

4.1.6.7 | Rotating pages in the PDF

This popular tool can be accessed via the Organize tab as well as on the Home tab.
This tool is so popular, we also added it as a shortcut in the Page thumbnail Pane as well as Context Menu.

Organize Comment View F(
Duplicate
Replace
Swap Rotate Crop Flatten Wat(
    Pages▾ Pages
    Left
508 ... ✕ Right
    Multi-page rotate

(PhantomPDF Windows shown)

4.1.6.8 | Organizing pages in the PDF

Organizing/Rearranging Pages can be done by simply dragging and dropping a page's thumbnail anywhere.

Additionally, PhantomPDF has an "Organize" Tab dedicated to all organization related tools, such as rotating, split, duplicate, insert, and more.
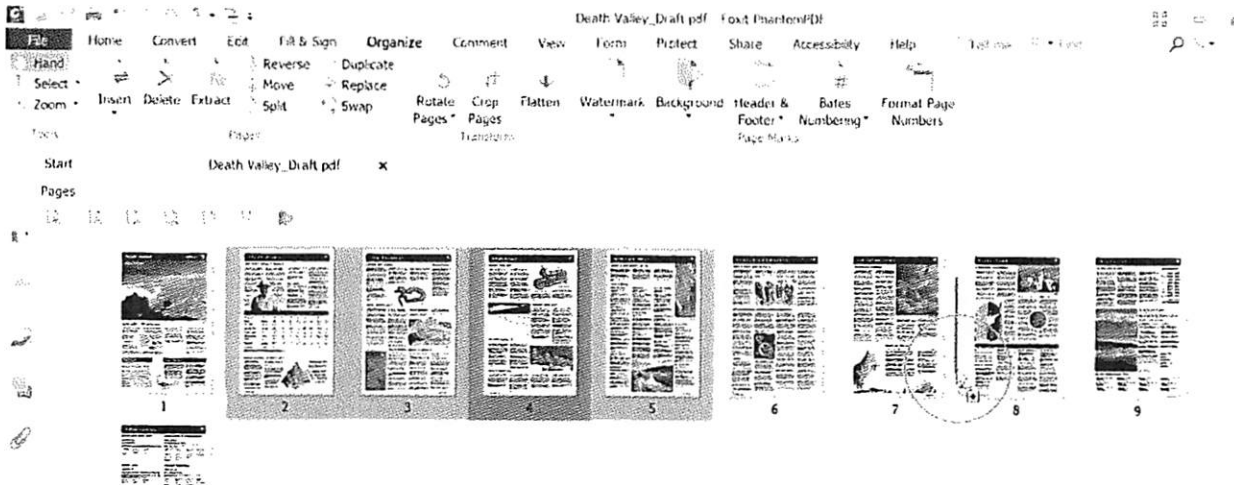
(PhantomPDF Windows shown)

4.1.6.9 | Ability to apply e-signature and request e-signature from another party.
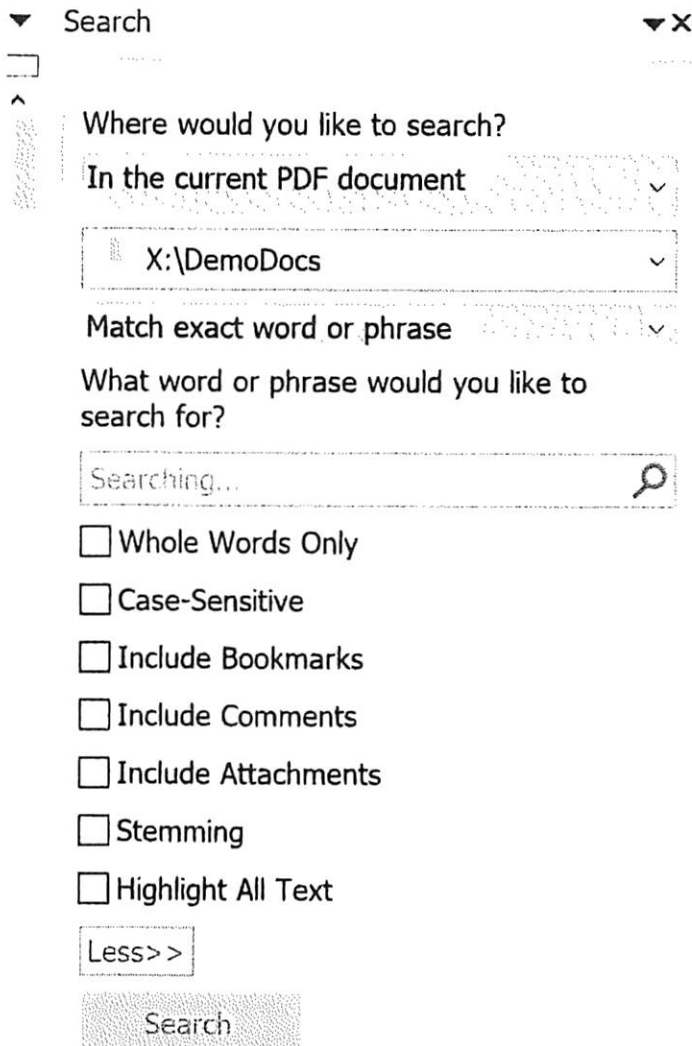
Foxit PhantomPDF can apply certificate signatures as well as use the DocuSign plugin for e-signature tracking. Foxit is currently working on an e-signature solution to apply and request e-signatures from another party. Available later in 2021.

4.1.6.10 | Ability to search within the PDF for particular words or phrases

The Find tool is always available on the top right of Foxit PhantomPDF and can also be opened using the CTRL+F command. There is also an Advanced Search tool available.

Users can search for a whole word or phrase, a list of either. As well as patterns such as SSN, Zip Codes, email address, and more.

▼ Search   ▼ X

⌐

^

Where would you like to search?

In the current PDF document   ∨

    X:\DemoDocs   ∨

Match exact word or phrase   ∨

What word or phrase would you like to search for?

Searching...   🔍

☐ Whole Words Only

☐ Case-Sensitive

☐ Include Bookmarks

☐ Include Comments

☐ Include Attachments

☐ Stemming

☐ Highlight All Text

Less>>

Search

(PhantomPDF Windows shown)

4.1.6.11 | Ability to compare two documents

PhantomPDF can compare two files to find textual/graphical deletions, insertions, or replacements.
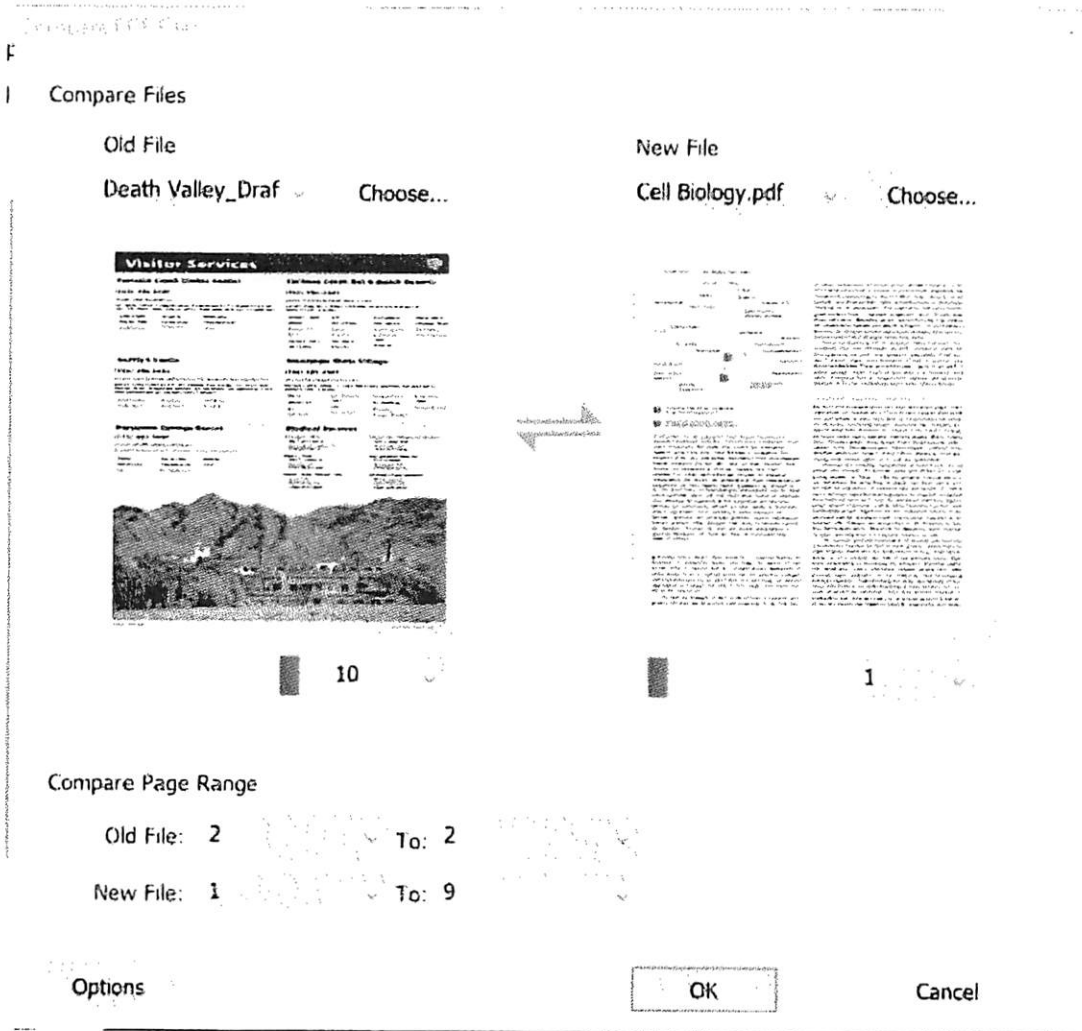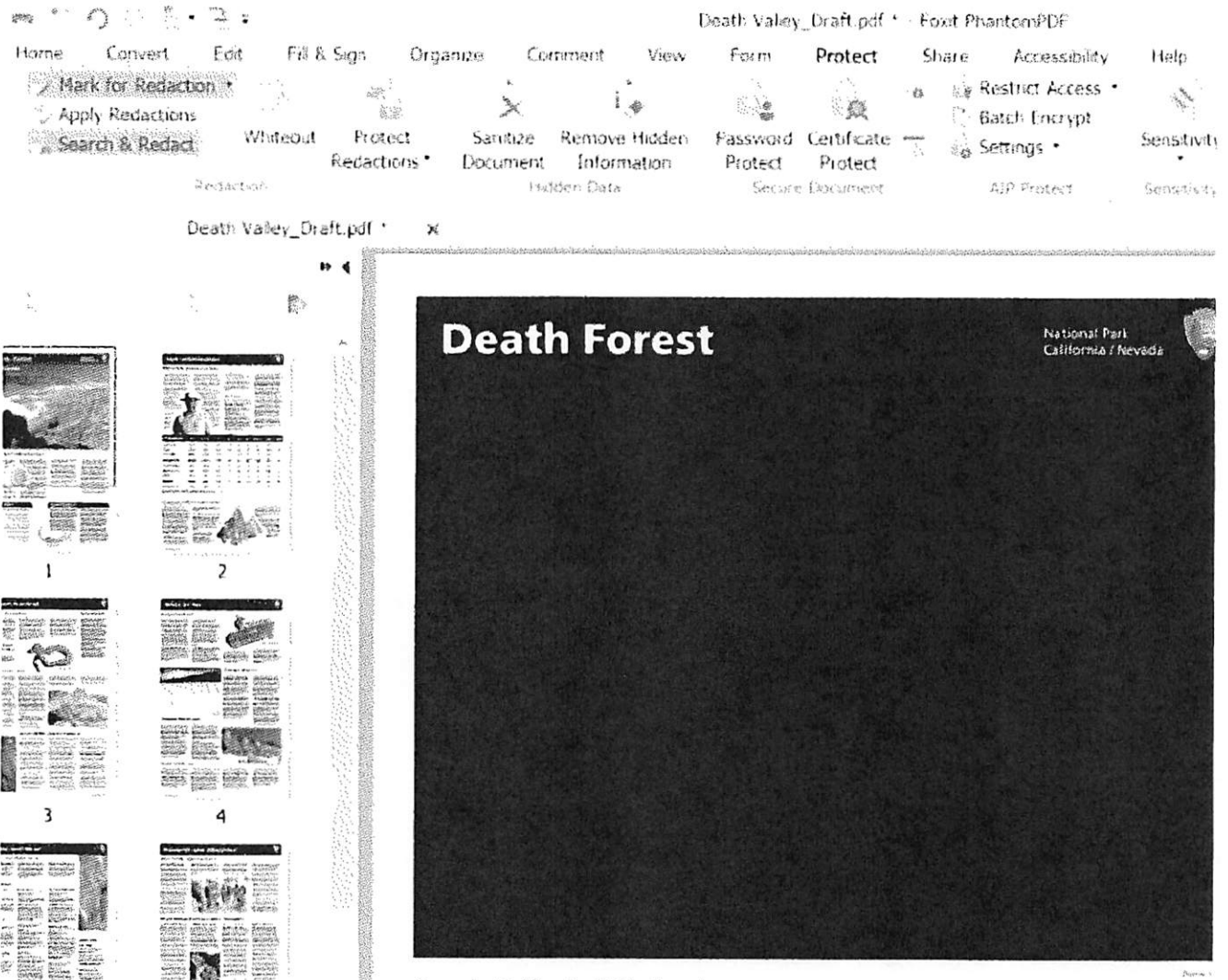

(PhantomPDF Windows shown)

4.1.6.12 | Ability to redact information from the document and ensure those redactions cannot be undone by another user in another medium

Foxit PhantomPDF Redaction tool can be accessed from the Protect Tab. Our redactions are trye redactions, meaning they remove everything behind the redacted area down to the metadata and cannot be undone by any user or software.

Additionally, users will be able to search and redact. i.e. redact all SSNs in a PDF or group of PDFs.
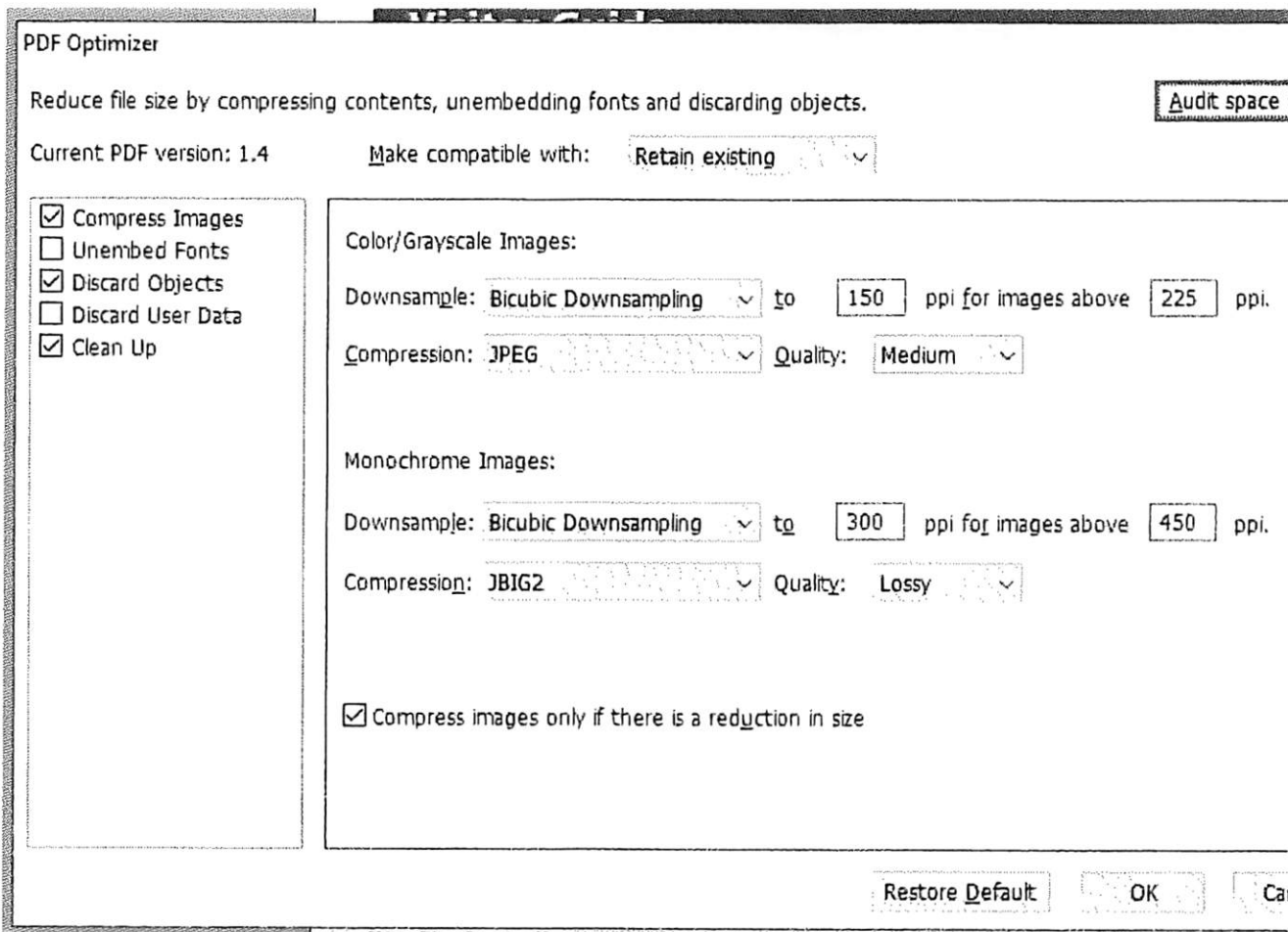

(PhantomPDF Windows shown)

4.1.6.13 | Capability to compress files and allow for size optimization when desirable

Foxit PhantomPDF provides two ways to compress and optimize PDFs.

Reduce File Size tool: to quickly compress a file without sacrificing quality.

PDF Optimizer

Reduce file size by compressing contents, unembedding fonts and discarding objects.

Current PDF version: 1.4   Make compatible with: Retain existing ⌄

Audit space

☑ Compress Images
☐ Unembed Fonts
☑ Discard Objects
☐ Discard User Data
☑ Clean Up

Color/Grayscale Images:

Downsample: Bicubic Downsampling ⌄ to [150] ppi for images above [225] ppi.

Compression: JPEG ⌄ Quality: Medium ⌄

Monochrome Images:

Downsample: Bicubic Downsampling ⌄ to [300] ppi for images above [450] ppi.

Compression: JBIG2 ⌄ Quality: Lossy ⌄

☑ Compress images only if there is a reduction in size

Restore Default   OK   Ca

Advanced Optimization tool (for Windows only, macOS coming in later 2021): to Audit Space Usage of a PDF to find what type of items are taking up the most space and compress from there.
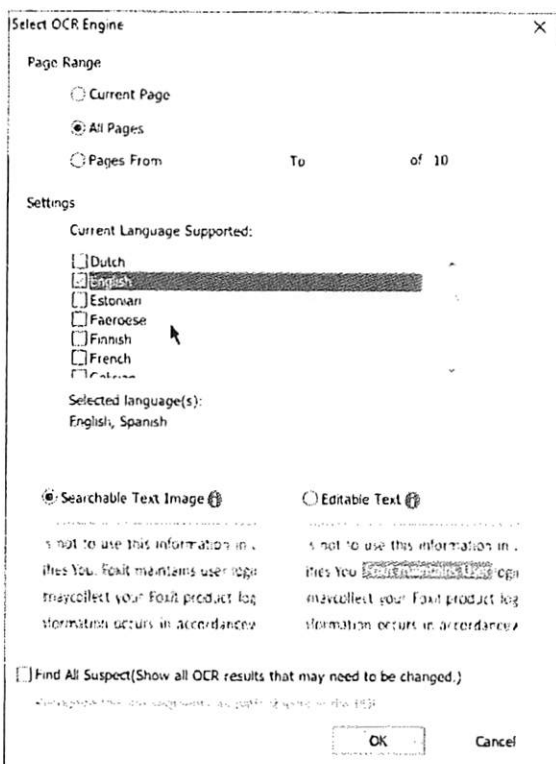(PhantomPDF Windows shown)

4.1.6.14 | Capability for optical character recognition and ability to edit text

PhantomPDF has a built-in OCR engine to make PDF's searchable and/or editable.
Additional features of our OCR:
- Supports over 40 languages,
- Can be applied to a single or multiple file
- Find All Suspects which allows users to correct over-characterization before the OCR is done
- Runs on up to four pages at a time
- Skips already OCR'd pages
- And more

(PhantomPDF Windows shown)

4.1.6.15 | Converting Microsoft and Google documents and spreadsheets into PDF

Users will be able to convert Microsoft and Google documents/spreadsheets to PDF. PhantomPDF supports the following formats:

Microsoft Office Word (•.doc;*.rtf;*.docx;*.dot;*.dotx;*.docm;'.dotm;*.wpd)
Microsoft Office Excel (*j(ls;'j(lt*.xlsx;*j(ltx;*.xlsm;*.xlsb;*.xltm;*.csv)
Microsoft Office PowerPoint (*.ppt;*.pptx;*.pot*.potx;*.pptm;".ppsx;'.ppsm;*.potm;
Microsoft Office Project ('.mpp.'.mppx)
Microsoft Office Visio (*.vsd;*.vsdx)
Microsoft Office Outlook (*.msg)
Txt ('.txt;*.text)
All Image Files ('.bmp;'.dib;'jpg;'.jpeg;*.jpe;'.gif;'.tif;,.tiff;,.png)
HTML C.htm;'.html;*.shtml)
WPS ('.wps)
Hancom Office HanWord ('.hwp)
XPS ('.xps)
PostScript/EPS (*.ps;*.prn;*.ep$)

4.3. | Mandatory Requirements: Any vendor's commodity that fails to comply with a mandatory requirement will be removed from further consideration for standardization. Those mandatory requirements are listed below.

4.4.1 | Must be compatible with latest versions of both Windows and Mac Operating Systems.

Foxit PhantomPDF is compatible with the latest versions of Windows and macOS. These are our minimum OS requirements:

Windows:
Windows 7 (32-bit & 64-bit)
Windows 8.x Full Version
Windows 10
Microsoft Office® 2007 or later version (required for some PDF creation features)
Verified as Citrix Ready® with Citrix XenApp® 7.13

macOS:
macOS 10.13 or higher
Microsoft Office® 2016 or later version (required for some PDF creation features)

4.4.2 | Must offer Enterprise Licensing Solution for the State.

Foxit supports Enterprise Licensing, either Perpetual or Subscription models, that allows licenses to be easily transferred from one employee to another without purchasing additional licenses. The license can be managed via our Admin Console or by using standard deployment tools such as SCCM.

4.4.3 | Must provide software patches and updates to keep software secure and functional.

We provide software patches and updates with the purchase of an annual Subscription license or the annual purchase of Software Assurance and Support.

4.4.4 | Must be compatible with Microsoft Office Suite and Google Workplace.

PhantomPDF can create PDFs from any Microsoft Office or Google Workplace file.

4.4.5 | Must be compatible with, at a minimum, Google Chrome 86.0.4240 and newer, Microsoft Edge 86.0.564 and newer, and Apple Safari 14 and newer.

Foxit PhantomPDF is a Desktop software that does not require a browser, nevertheless users will be able to create PDFs from any of the web browsers mentioned above.

4.4.6 | Must be compatible with mobile devices, including smartphones.

Foxit PDF Mobile app is compatible with iOS Requires iOS 11.0 or later., as well as Android 4.1 and up.

4.4.7 | Must provide centralized administration.

Foxit Admin Console is available for centralized administration.

4.4.8 | Must provide functionalities for editing PDF files.

Foxit PhantomPDF provides all the tools the State will need to edit PDF files.

4.4.9 | Must provide accessibility for individuals with disabilities, including both visually impaired and hearing-impaired individuals.

Foxit PhantomPDF accessibility mode makes it compatible with all accessibility tools including JAWS screen reader. Additionally, the software can be used to generate Section 508 or WCAG AA compliant PDFs.

4.4.10 | Must integrate with Enterprise Applications, including Microsoft SharePoint and Google Sites.

Foxit PhantomPDF has built-in integrations with SharePoint as well as Google Drive.

4.4.11 | A Vendor wishing to have its product evaluated must provide the State with three (3) free licenses and/or three (3) free temporary licenses of its proposed product.

Foxit will provide three (3) free licenses and/or three (3) free temporary licenses of Foxit PhantomPDF for evaluation purposes.

4.4.11.1 | The State will contact each of the Vendors who have submitted a response to the RFI in order to obtain a license and/or license key.

4.4.11.2 | The Vendor must provide the license and/or license key within five (5) calendar days of the request.

Please contact Casey Nicodemus for the evaluation licenses.
Email: casey_nicodemus@foxitsoftware.com
Telephone: (470) 615-1296
Mobile: (404) 918-9830

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

TABLE OF CONTENTS

SECTION 1: GENERAL INFORMATION

1.1. Introduction:

The West Virginia Office of Technology (WVOT) ("Agency"), on behalf of West Virginia state agencies and via the West Virginia Purchasing Division, is issuing this Standardization Notice to all vendors that have a desire to provide the State of West Virginia with PDF editing software. Pursuant to W. Va. Code § 5A-3-61, the State is permitted to standardize certain commodities and this Notice is intended to provide all interested parties with an opportunity to have their commodity evaluated for the potential standard. Once a standard has been established, the State's future procurements for that commodity will be limited to the standard for the period of time identified in this document.

1.2. Standardization Schedule of Events:

RFI Released To Public .... See wvOASIS
Vendor's Written Questions Submission Deadline 02/09/2021
Pre-Evaluation Conference .... N/A
Addendum Issued... TBD
RFI Opening Date.. 03/02/2021
Delivery of Commodity for Testing Deadline ....(See Section 4.4.11)
Oral Presentation/Demonstration *(Agency Option)* .... N/A
Notice of Intent to Standardize Issued .... TBD

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

SECTION 2: INSTRUCTIONS TO VENDORS SUBMITTING BIDS

1. **REVIEW DOCUMENTS THOROUGHLY:** This form contains a request for information that will lead to a commodity standard being developed. Please read these instructions and all documents attached in their entirety. These instructions provide critical information about requirements that if overlooked could lead to disqualification of a Vendor's submission. All submissions must be in accordance with the provisions contained herein. Failure to do so may result in disqualification of Vendor's submission.

2. **PRE-EVALUATION CONFERENCE:** The item identified below shall apply to this Solicitation.

   [X] A pre-evaluation conference will not be held prior to the submission deadline.

   [ ] A Non-Mandatory pre-evaluation conference will be held prior to the submission deadline at:

   [ ] A MANDATORY Pre-Evaluation Conference will be held at the following place and time:

   All Vendors providing a submission for consideration must attend the mandatory pre-evaluation conference. Failure to attend the mandatory pre-evaluation conference will result in disqualification of the Vendor's submission. No one person attending the pre-evaluation conference may represent more than one Vendor. An attendance sheet provided at the pre-evaluation conference shall serve as the official document verifying attendance. The State will not accept any other form of proof or documentation to verify attendance. Any person attending the pre-evaluation conference on behalf of a Vendor must list on the attendance sheet his or her name and the name of the Vendor he or she is representing. Additionally, the person attending the pre-bid meeting should include the Vendor's E-Mail address, phone number, and Fax number on the attendance sheet. It is the Vendor's responsibility to locate the attendance sheet and provide the required information. All Vendors should arrive prior to the starting time for the pre-bid. Vendors who arrive after the starting time but prior to the end of the pre-qualification meeting will be permitted to sign in but are charged with knowing all matters discussed.

Revised 6/8/2018

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

3. **VENDOR QUESTION DEADLINE:** Vendors may submit questions relating to this RFI to the West Virginia Purchasing Division. Questions must be submitted in writing. All questions must be submitted on or before the date listed below and to the address listed below in order to be considered. A written response will be published in an RFI addendum if a response is possible and appropriate. Non-written discussions, conversations, or questions and answers regarding this RFI are preliminary in nature and are nonbinding. Submitted e-mails should have the RFI number in the subject line. Question Submission Deadline: Submit Questions to:

Mark Atkins, Senior Buyer

Email: Mark.A.Atkins@wv.gov

Submission Deadline: 02/09/2021 due by 10:00am EST.

4. **YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Vendor's entire response to the RFI and any correspondence relating thereto are public documents. As public documents, they will be disclosed to the public following the RFI opening as required by the competitive bidding laws of West Virginia Code §§ 5A-3-1 et seq., and the Freedom of Information Act West Virginia Code §§ 29B-1-1 et seq.

DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, A TRADE SECRET, OR OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.

Submission of any document to the State constitutes your explicit consent to the subsequent public disclosure of the document. The Purchasing Division will disclose any document labeled "confidential," "proprietary," "trade secret," "private," or labeled with any other claim against public disclosure of the documents, to include any "trade secrets" as defined by West Virginia Code § 47-22-1 et seq. All submissions are subject to public disclosure without notice.

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

SECTION 3: GENERAL TERMS AND CONDITIONS

1. **Not a Contract Document:** Vendors must understand that a response to this RFI does not generate a contractual obligation in the part of the State to Purchase any commodity. Purchasing will only be permitted after the Agency that is seeking to develop a standard has executed the appropriate procurement to make a purchase.

2. **Cancellation:** Any standard that is developed from this RFI may be cancelled by the State for any reason upon providing the vendor with 30 days' notice of cancellation.

3. **Sole risk on Vendor** – Any commodity that the vendor provides to the State for evaluation purposes will be provided and the sole risk and cost of the vendor. The State will not pay for commodity samples. Damage or destruction of the commodity being tested should be expected as part of the testing process and vendor will not be compensated for it.

4. **Insurance:** Vendor must maintain at least $1,000,000 in general commercial liability insurance, and $1,000,000 in products liability coverage, if not included in general commercial liability insurance.

5. **Delivery:** Vendor will be responsible for delivering the commodity to the evaluating agency and retaking possession of anything that remains of the commodity at vendor's sole cost and liability.

SECTION 4: COMMODITY EVALUATION METRICS

4.1. Methods of Testing/Analysis/Interoperability and Objectives:

4.1.1 The State desires to have an enterprise-level, transferrable licensing model, whereby a previously purchased license can be reassigned to another employee without requiring the State to purchase that license again. Please explain how your proposed product can meet this goal or describe in detail any other cost savings your proposed product offers.

4.1.2 The State's network security is vitally important and products on the network must be secure and up to date. As such, the State desires a PDF editing software that ensures continued functionality, updates to fix bugs and patches to address security vulnerabilities. Please describe how your company and/or proposed solution addresses bugs, upgrades, patches, and fixes.

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

4.1.3 The State desires a PDF editing software that can be used with both Microsoft Office products and Google's Workplace suite. In particular, the State desires the ability to have a PDF editor that can convert documents, spreadsheets, and other productivity tools into PDFs, as well as the ability to convert PDFs into editable documents.

4.1.4 The State is seeing an increased reliance on mobile devices, such as smartphones and tablets. The State desires a PDF editing software that is compatible with both iOS and Android devices. Please describe your product's compatibility with mobile devices, different operating systems, and the licensing model to do so. Specifically, is there an additional license or fee associated with this mobile requirement, or is it built into the cost of the license.

4.1.5 As a centralized IT organization, the State desires the ability to administer the licenses from an administrator portal. The portal, which will have multiple administrators, would provide the capability to install and assign, reassign, and remove licenses from users' devices or accounts. Please describe your product's centralized administration offering, including the functionalities an administrator has.

4.1.6 The State desires a robust set of editing functionalities, including, at a minimum:
    4.1.6.1 Locking the PDF so no other user may make changes
    4.1.6.2 Creating a fillable form, whereby users can only type in the designated areas of the form
    4.1.6.3 Editing the PDF by being able to insert pictures or text
    4.1.6.4 Combining multiple files into one file
    4.1.6.5 Extracting pages from one file into separate files
    4.1.6.6 Deleting pages from a PDF document
    4.1.6.7 Rotating pages in the PDF
    4.1.6.8 Organizing pages in the PDF
    4.1.6.9 Ability to apply e-signature and request e-signature from another party
    4.1.6.10 Ability to search within the PDF for particular words or phrases
    4.1.6.11 Ability to compare two documents
    4.1.6.12 Ability to redact information from the document and ensure those redactions cannot be undone by another user in another medium
    4.1.6.13 Capability to compress files and allow for size optimization when desirable
    4.1.6.14 Capability for optical character recognition and ability to edit text
    4.1.6.15 Converting Microsoft and Google documents and spreadsheets into PDF

In order to evaluate the product's functionalities, the State will test each offering and score it based on its ability to do the above tasks without error. Each of the functionalities is worth two (2) points. Those products which execute each task without error will receive full credit, while any errors will result in a deduction of points.

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

4.2. Research Outside the Proposal: The agency may include in its evaluation, resources such as publications, periodicals, company financials, governmental filings, judicial proceedings, fines and fees imposed, professionals from the field in question, and other information that the agency deems relevant.

4.3. Mandatory Requirements: Any vendor's commodity that fails to comply with a mandatory requirement will be removed from further consideration for standardization. Those mandatory requirements are listed below.

4.4.1 Must be compatible with latest versions of both Windows and Mac Operating Systems.

4.4.2 Must offer Enterprise Licensing Solution for the State.

4.4.3 Must provide software patches and updates to keep software secure and functional.

4.4.4 Must be compatible with Microsoft Office Suite and Google Workplace.

4.4.5 Must be compatible with, at a minimum, Google Chrome 86.0.4240 and newer, Microsoft Edge 86.0.564 and newer, and Apple Safari 14 and newer.

4.4.6 Must be compatible with mobile devices, including smartphones.

4.4.7 Must provide centralized administration.

4.4.8 Must provide functionalities for editing PDF files.

4.4.9 Must provide accessibility for individuals with disabilities, including both visually impaired and hearing-impaired individuals.

4.4.10 Must integrate with Enterprise Applications, including Microsoft SharePoint and Google Sites.

4.4.11 A Vendor wishing to have its product evaluated must provide the State with three (3) free licenses and/or three (3) free temporary licenses of its proposed product.
4.4.11.1 The State will contact each of the Vendors who have submitted a response to the RFI in order to obtain a license and/or license key.
4.4.11.2 The Vendor must provide the license and/or license key within five (5) calendar days of the request.

SECTION 5: VENDOR RESPONSE

5.1. Incurring Cost: Neither the State nor any of its employees or officers shall be held liable for any expenses incurred by any Vendor responding to this RFI, including but not limited to preparation, delivery, samples, or travel.

5.2. Proposal Format: Vendors should provide responses in the format listed below:

5.2.1. Title Page: State the RFI subject, number, Vendor's name, business address, telephone number, fax number, name of contact person, e-mail address, and Vendor signature and date.

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

5.2.2. **Table of Contents:** Clearly identify the material by section and page number.

5.2.3. **Response Reference:** Vendor's response should clearly reference how the information provided applies to the RFI request. For example, listing the RFI number and restating the RFP request as a header in the proposal would be considered a clear reference.

5.2.4. **Responses:** All responses must be submitted to the Agency prior to the date and time stipulated in the RFI as the opening date. All submissions must be in accordance with the provisions listed in Section 2: Instructions to Vendors Submitting Commodities.

SECTION 6: EVALUATION AND AWARD

Evaluation Process: Responses will be evaluated by a committee of three (3) or more individuals. The Vendor who demonstrates that it meets all of the mandatory specifications required and attains the highest overall point score of all Vendors will be awarded the standardization, if after conducting its evaluation, the Agency determines that Standardization is still warranted.

6.1. **Evaluation Criteria:** The evaluation will be based upon the point allocations designated below for a total of 100 points.

Evaluation Point Allocation:	Points
4.1. Methods of Testing/Analysis/Interoperability and Objectives:	
4.1.1 Licensing Model	20
4.1.2 Product Security	10
4.1.3 Interoperability with Microsoft and Google	10
4.1.4 Compatibility with Mobile Devices	10
4.1.5 Centralized Management	10
4.1.6 Functionalities and Features	30
4.2. Research Outside the Proposal:	10
Total Score:	**100 Points Possible**

STANDARDIZATION NOTICE
Request for Information
West Virginia Office of Technology (WVOT)
CRFI 0210 ISC2100000001

By signing below, I certify that I have reviewed this Request for Information in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this proposal or any documents related thereto on vendor's behalf.

KOMAX, LLC
_____
(Company)

DAVID HUMPHREY
_____
(Representative Name, Title)

304-744-7440 / 304-744-7450
_____
(Contact Phone/Fax Number)

03/02/2021
_____
(Date)

Revised 6/8/2018

WV-80
Approved
06/8/2018

West Virginia Purchasing Division

STANDARDIZATION:
Approval Request Form

Statutory Authority: Pursuant to *West Virginia Code* §5A-3-61, a state agency may standardize the purchase of commodities used on a repeated basis if certain requirements are met. The Agency requesting authority to Standardize on a certain commodity must complete this form in its entirety and submit it to the Purchasing Division for consideration prior to pursuing standardization.

<u>Standardization</u>

Agency / Department: West Virginia Office of Technology/Department of Administration

Procurement Officer: Andrew Lore, Procurement Manager/ISMII

Date of Request: August 26, 2020

Desired Duration of Established Standard: ☐ 1 Year   ☐ 2 Years   ☐ 3 Years   ☑ 4 Years

1. **Description** – Provide description of commodity being standardized (include anticipated annual purchase quantity):

   PDF Editing Software that provides enhanced features such as combining files, page extraction, and other editing functionalities. Anticipated annual purchase volume (from agencies subject to WVOT approval) is estimated to be 350-400 licenses.

2. **Core Mission** – Explain how commodity represents core function of the Agency's mission (Per W. Va. Code § 5A-3-61(b):

   PDF Editing Software has always been helpful in agencies' duties. In recent months, with the COVID-19 pandemic and the implementation of work-from-home policies, the need to PDF editing software has become even more apparent. Without access to printers and scanners, agencies can no longer make handwritten edits, remove pages, etc. before rescanning the document. This software can be utilized by all state agencies for its PDF needs.

3. **Savings:** Explain how standardization would save time and money (reduction in procurement time/effort cannot be grounds for savings) (Per W. Va. Code § 5A-3-61(b)):

   Having staff trained and utilizing the same software would result in savings, as knowledge sharing, peer training, technical support, and customer support become easier. From a technical perspective, a standardization would help streamline implementation procedures and would allow administrators maintaining employees' devices to standardize their procedures as different installation requirements would not need to be considered.

4. **Testing, Evaluation, Interoperability** – Explain how the commodity requires testing or evaluation to determine accuracy or consistency or require interoperability in a larger system or network (Per W. Va. Code § 5A-3-61(b)):

   Like with most technology, vendors create products to separate themselves from the competition – PDF editors are no exception. What this means for practical purposes is that each product contains different functionalities and features. To ensure all needed functionalities and features are included, product testing is required and a comparison of products must occur.

5. **Evaluators:** Identify the individuals who will be evaluating the commodities (at least one evaluator must be the spending unit's procurement officer) (Per W. Va. Code § 5A-3-61(d)(2):

   Heather Abbott - COO, Donnie Patterson - Deputy COO, Jamison Mitchell - Director of Applications, Justin McAllister - CFO, Hope Fout - Enterprise Services Manager, Andrew Lore - Procurement Manager

6. **Evaluation Method:** Explain how the spending unit intends to test or evaluate commodities submitted for standardization purposes (field tests, professional reviews, etc.)
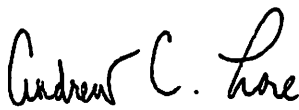
   The WVOT will create a scoring sheet for evaluating the products, outlining each required functionality, and then partake in product testing. Areas of evaluation will be editing functionalities, ease-of-use, and licensing options.

7. **Interoperability:** Explain how the commodity in question needs to be interoperable within a larger system.

   PDF editing software must be interoperable with the State's devices and their operating systems, with the ability to convert, edit, and reorganize products from Microsoft's Office suite.

8. **Vendors Known to Have an Interest:** List any vendors that are known to have an interest in having their commodities considered for standardization.
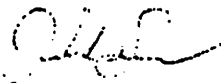
   Adobe Acrobat, Nuance/Kofax, PDFElement, Foxit PhantomPDF, HiPDF

Andrew C. Lore

_____   August 26, 2020
Agency Procurement Officer Signature   _Date:_
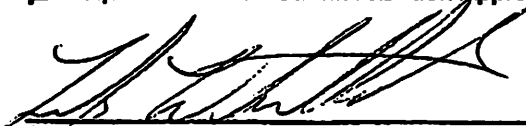
_____   **August 26, 2020**
Head of Spending Unit Signature   _Date:_

For Purchasing Division's Use Only

☐ Request to Pursue Standardization Denied

☑ Request to Pursue Standardization Approved

_____   8/27/20
Purchasing Director / Designee Signature   _Date:_